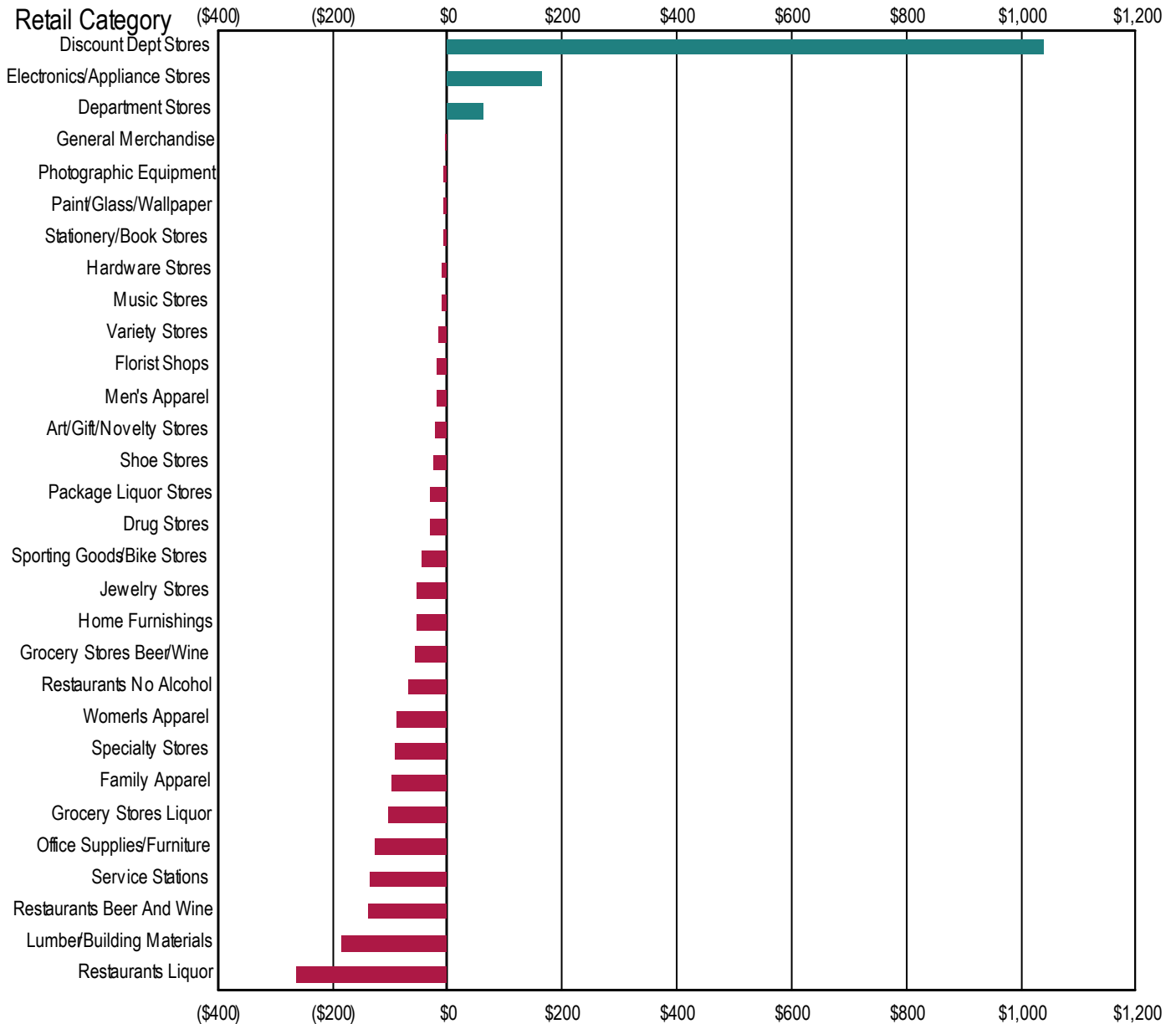


CITY OF CHULA VISTA

PER CAPITA SALES TAX SURPLUS/GAP COMPARISON - 4 QUARTERS ENDING
3Q 2013



The above graph compares **per capita** sales tax generated from targeted retail categories against countywide averages. A **retail surplus** suggests the community is capturing its local market for that category of goods plus attracting shoppers from outside the jurisdiction. A **retail gap** suggests the possibility that residents may have a greater demand for products in the specific category than is being satisfied by local businesses. The information is provided only as a **starting point** in identifying potential sources of sales tax loss and should not automatically be interpreted as an expansion or leveraging opportunity without more detailed analysis and assessment.

CITY OF CHULA VISTA

PER CAPITA SALES TAX SURPLUS/GAP COMPARISON - 4 QUARTERS ENDING □□3Q 2013

Retail Category	Per Cap Sales Capture (+) or Gap (-)	Sales Tax Deviation	Typical Sales Per Sq Ft by Retail Type	Approx Sq Ft to Close Gap
Discount Dept Stores	\$1,038	\$2,611,416	\$475	n/a
Electronics/Appliance Stores	163	411,211	500	n/a
Department Stores	63	159,095	175	n/a
General Merchandise	(5)	(13,411)	100	13,000
Photographic Equipment	(7)	(16,556)	Insufficient data	Insufficient data
Paint/Glass/Wallpaper	(7)	(16,682)	250	7,000
Stationery/Book Stores	(7)	(18,519)	200	9,000
Hardware Stores	(9)	(21,614)	225	10,000
Music Stores	(10)	(25,966)	200	13,000
Variety Stores	(16)	(41,063)	100	41,000
Florist Shops	(18)	(44,208)	150	29,000
Men's Apparel	(18)	(44,837)	225	20,000
Art/Gift/Novelty Stores	(21)	(53,619)	150	36,000
Shoe Stores	(24)	(59,884)	200	30,000
Package Liquor Stores	(30)	(75,635)	Insufficient data	Insufficient data
Drug Stores	(31)	(78,201)	350	22,000
Sporting Goods/Bike Stores	(44)	(110,986)	225	49,000
Jewelry Stores	(53)	(134,412)	500	27,000
Home Furnishings	(55)	(137,834)	175	79,000
Grocery Stores Beer/Wine	(56)	(140,450)	175	80,000
Restaurants No Alcohol	(67)	(168,707)	650	26,000
Women's Apparel	(87)	(219,859)	375	59,000
Specialty Stores	(91)	(228,364)	175	130,000
Family Apparel	(96)	(240,945)	375	64,000
Grocery Stores Liquor	(104)	(261,778)	110	238,000
Office Supplies/Furniture	(125)	(315,321)	225	140,000
Service Stations	(135)	(339,678)	n/a	n/a
Restaurants Beer And Wine	(139)	(349,566)	575	61,000
Lumber/Building Materials	(185)	(466,113)	300	155,000
Restaurants Liquor	(261)	(657,691)	575	114,000

Average sales per square foot are based on HdL's overview of average statewide chain store sales. The square footage needed to close the gap is only on approximation and specific demand will vary with regional and local market conditions and individual retailers.